



CAL-ACCESS Replacement System Project

California Secretary of State

CARS Schedule Management Plan

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1 Introduction

In 1974, California voters approved Proposition 9, the Political Reform Act of 1974 (PRA). The PRA requires, among other things, the disclosure of campaign contributions and expenditures, and state lobbying activity, so that receipts and expenditures in election campaigns are fully disclosed so voters may be fully informed and improper practices may be inhibited, and so that activities of lobbyists are regulated and their finances disclosed, in order that improper influences will not be directed at public officials.

In 1997, the PRA was amended to include the Online Disclosure Act, a measure that paved the way for electronic and online submission of campaign and lobbying disclosure information over the Internet. This Act had the following two primary objectives:

- Providing greater public access to vitally important information and
- The gradual elimination of paper filings of campaign finance and lobbying activity statements and reports.

The Online Disclosure Act led the Secretary of State (SOS) to develop and deploy a public website called the California Automated Lobby Activity and Campaign Contribution and Expenditure Search System (CAL-ACCESS), which is the public's window into California's campaign disclosure and lobbying financial activity.

To interpret and enforce the requirements of the PRA, the Fair Political Practices Commission (FPPC) was established. The FPPC has primary responsibility for the impartial administration, implementation and enforcement of the PRA. The Franchise Tax Board (FTB) is responsible for carrying out mandatory and random audits of filers and the disclosure data filed with the SOS. All three agencies rely heavily on CAL-ACCESS, and work cooperatively and collaboratively to fulfill mandated duties.

To assure the highest standards of data integrity and timeliness, the Political Reform Division (PRD) was established within the SOS to administer state filing requirements set forth in the PRA. The PRD, staffed with 29 full-time positions, conducts a broad range of program activities to facilitate and monitor compliance with reporting requirements and to provide public access to all data and filings. Filing requirements for campaign committees and lobbying entities provide for two basic steps – registration and reporting. Three dozen different forms that capture specific information based on committee or lobbying entity type and activity are used for these purposes. Over the last four two-year election cycles, the PRD has averaged approximately 97,000 campaign and lobbying filings in election years and 61,000 campaign and lobbying filings in non-election years. Since 1999, the earliest stages of CAL-ACCESS development, more than 1.2 million filings have been processed. A filing is a report or statement that can range in size from a single page to thousands of pages.

In addition, the PRD is required to publish biennially a Lobbying Directory that includes identifying information on registered lobbyists, lobbying firms, and lobbyist employers and clients.

1.1 Purpose

Schedule Management is a process that is critical to effective management of the SOS CARS Project. The Schedule Management process defined in this plan is focused on tracking and reporting the status of deliverables and work products through a CARS Project Schedule (CPS) ahead of development of a CARS fully Integrated Project Schedule (IPS). The project develops and maintains a pre-procurement project schedule through the CARS System Integrator (SI) on boarding and development of the IPS. The IPS is envisioned to track the tasks and resources for the complete project and all project teams.

This Schedule Management Plan provides the standards for creating, monitoring, and controlling the CPS to help enable a comprehensive project view, leading to the timely completion of the CARS Project. The plan provides descriptions of:

- Roles and responsibilities specific to schedule management
- The standards for structuring the schedule
- Frequency and process of schedule updates
- How progress and performance are assessed and tracked
- How changes to the schedule are proposed and approved
- How and where the schedule files are maintained

1.2 Scope

The scope of this plan includes definition of the standards related to the development, management, analysis, and maintenance of the CPS.

1.3 Assumptions and Constraints

The following assumptions and constraints were identified during the development of this plan:

- The primary roles in schedule management are covered in this plan. Other CARS Project roles are covered in the relevant project documents.
- This plan provides details of how the activities within the CPS are standardized.
- The CARS Project has standards and processes for schedule management that apply and adapt industry best practices to the specific needs and constraints of the Project and SOS.
- The schedule management process aligns with guidelines set forth in the Project Management Institute's (PMI) Project Management Body of Knowledge (PMBOK®) and the California Department of Technology Project Management Methodology.

1.4 Acronyms

The current version of the SOS CARS Project Glossary is located at the following path in the CARS Communications project folder:

[REDACTED](#)

1.5 Document Maintenance

The Schedule Management Plan is a living document and is amended or modified as needed throughout the life of the project. The plan is updated if schedule management roles are added or revised, additional entities or responsibilities are formally assigned, or processes are revised to better fit the needs of the project. This document is reviewed and need for changes assessed, at a minimum, at the end of each phase of the CARS Project. This document contains a revision history log. When changes occur, the version number is updated to the next increment and the date, and the author of the change and what has changed is recorded in the revision summary log of the document.

1.6 Project Schedule File Location

The current and historical schedule files are located in CARS Project Library share drive, at the path below:

[REDACTED](#)

2 Overview

The SOS CARS Project schedule management approach involves definition of standards and guidelines for development, maintenance, control, and archival of the CPS. The CPS is owned and maintained by the SOS CARS Project Manager (CARS PM) and contains details of activities for all CARS Project sub-teams. The individual sub-teams include, but are not necessarily limited to:

- SOS
- Business Analysis Team, TMS
- Enterprise Architect Team, Alexan-RPM
- Local Filing Analyst, Alexan-RPM

As part of their scope of work, each team develops an input schedule using MS Project 2010, above or as otherwise agreed to. The CARS PM consolidates all activities into the CPS. The teams collaborate and validate the CPS to ensure dates, effort estimates, and resources are reasonable.

The schedule is developed using a standard Work Breakdown Structure (WBS). This WBS lays project work out on a phase basis. Work activities within the phase are defined down to a work package level within the Rolling Wave and at a higher level outside the Rolling Wave. The team applies the following process steps in development and maintenance of the CPS:

- Defining estimates and developing schedules:
 - Activity definition
 - Task sequencing
 - Resource assignments
 - Duration estimation

- Schedule submission and approval
- Reporting progress:
 - Progress towards completion of milestones and deliverables
 - Duration variance
 - Schedule variance percentage
 - Overall project status
 - Monitoring schedule quality
- Controlling Performance:
 - Change Control

3 Roles and Responsibilities

This section identifies the primary project staff actively involved in scheduling the work of the project and analyzing schedule performance.

Table 1: CPS Roles & Responsibilities

ROLE	HIGH-LEVEL RESPONSIBILITIES FOR SCHEDULE MANAGEMENT
CARS PM	<ul style="list-style-type: none"> ● CPS development, management and reporting ● Provides status reporting and updates on the tasks and resources ● Analyzes and resolves any variances or deviations to the tasks and resources ● Works with component schedule owners to resolve concerns resulting from schedule update processes ● Works with the CARS Team to obtain status updates
BA Team and EA Team Project Managers	<ul style="list-style-type: none"> ● Provides a detailed schedule as part of their respective scope of work ● Manages the tasks and activities impacting their respective scope of work ● Reviews and provides updates on the tasks and resources impacting their respective scope of work to the CARS PM ● Analyzes and resolves any deviations to the tasks and resources impacting their respective scope of work ● Support schedule attributes and detail for reporting for their respective scope of work
CARS Project Team	<ul style="list-style-type: none"> ● Review CPS and provide feedback to the CARS PM ● Provide weekly update to the CARS PM for schedule update

ROLE	HIGH-LEVEL RESPONSIBILITIES FOR SCHEDULE MANAGEMENT
	purposes

4 Schedule Standards

The CARS Project has the following standards and process in place to distribute, collect, update, integrate, and report on project schedule data. This section outlines the schedule management standards that the project follows.

4.1 General Standards

General standards for developing, maintaining, and controlling the CPS are referenced below.

- SOS utilizes Microsoft Project 2016 as its scheduling tool, unless otherwise stated.
- Tasks are action-oriented and have a measurable output to confirm the resources assigned are clear as to what is required upon completion of the task. Examples of acceptable tasks are to create reports to management, build pieces of code for an application, create project definition documents, etc.
- Tasks (work packages) are decomposed to duration of one week (5 days) and four weeks (20 days), where practical, with the exception of Level of Effort (LOE).
- In certain instances, tasks may need to be scheduled and tracked in increments smaller than the 5 – 20 day guideline provided in this plan. However, every attempt is made to keep the use of very short duration tasks to a minimum. This level of detail ensures three things:
 - The status of each task is easily measurable,
 - Tasks are not so large that the schedule is reliant on status alone, and
 - There is not so much detail that the schedule becomes unmanageable.
- Milestones are established throughout the CPS to highlight key activities. Examples of milestones are deliverables completion dates.
- Task dependencies are based on logical relationship and, where possible, are set to 'As Soon As Possible'. Where a date constraint is absolutely necessary, only the 'Start No Earlier Than' constraint type is used. Exceptions are not common, but if and when they occur, the reason is noted in the Notes field. Critical dates are entered as deadlines within the schedule tool rather than as hard constraints.
- All tasks include predecessor. Exceptions are not common, but if and when they occur, the reason is noted in the Notes field.
- Tasks are fixed duration.
- There are no dependencies assigned for summary level tasks.
- CPS tasks are dependency-driven to enable critical path analysis of the CPS.
- Resources are assigned to tasks within the Rolling Wave.
- Resources are named in the CPS for tasks, whether for individual, team, or "TBD" (e.g., uniquely named, unidentified individuals' roles).
- Resource allocation is validated within the Rolling Wave.

- The CPS includes balanced SOS resources during the Rolling Wave period. Resource leveling is accomplished on a monthly level.
- Milestones contain predecessor and successor dependencies.
- Milestones are entered into the CPS with duration of zero days.

4.2 Standard Work Breakdown Structure (WBS)

This section is updated when more information is available from the CARS SI. The overall CARS project is implemented in the following phases as defined in the CARS SI RFO:

Phase 0 – Ongoing Process Tasks and Deliverables (Ongoing throughout all Phases)

- 0.1) Project Control and Status Reporting
- 0.2) Maintain and Update Project Management Plans (as appropriate)
- 0.3) Bi-Weekly Project Management Reports and Attend Weekly Project Meetings
- 0.4) Attend Project Meetings (as required)
- 0.5) Ongoing Issues Management and Risk Tracking
- 0.6) Written Monthly Project Status Reports
- 0.7) Change Control Processes
- 0.8) Communications Processes
- 0.9) Organizational Change Management Processes
- 0.10) Final Report for each phase

Phase I - Project Initiation and Planning

- I.1) CARS Project Kick-Off Meeting
- I.2) CARS Project Management Plan
- I.3) Integrated Project Schedule
- I.4) Quality Management Plan
- I.5) CARS Test Plan
- I.6) System Configuration Management Plan
- I.7) Data Integration Plan Support
- I.8) Training Plan
- I.9) Requirements Traceability Matrix Plan
- I.10) Phase 0 Ongoing Process Tasks and Deliverables

Phase II – System Requirements Confirmation, Architecture and Design

- II.1) System Requirements Specification Documentation
- II.2) System Technical Architecture Documentation
- II.3) System Data Model and Data Dictionary
- II.4) Detailed System Design Specifications
- II.5) System Detailed Requirements Traceability Matrix
- II.6) Phase 0 Ongoing Process Tasks and Deliverables

Phase III – System Development, Testing, and Deployment

- III.1) Unit Testing (UT) and Code Review Completion
- III.2) System Configuration and System Testing (ST) Completion
- III.3) Data Integration Completion and Report

- III.4) Develop CARS System Training Materials and Complete Training
- III.5) CARS End-to-End Acceptance Testing Completion and Final Deployment
- III.6) Phase 0 Ongoing Process Tasks and Deliverables

Phase IV - First-Year Operations and Closeout

- IV.1) Monthly Operations Support and Performance Reports
- IV.2) Final System Documentation and Source Code
- IV.3) Unanticipated Changes for M&O

4.3 Task Naming Conventions

The CARS Project Schedule task naming conventions are as follows:

- Descriptive, but as brief as possible
- Action-oriented (Build, Design, Review, Distribute, etc.)
- Unique
- Reference the deliverable name and number where applicable

4.4 Resource Standards

The following general standards are used to define and assign resources:

- The CPS includes resource loading of all contractors (including SI, BA Team, EA Team, other State departments, Independent Verification and Validation, etc.).
- Resources are assigned to tasks at a task level; no resources are assigned to summary tasks or milestones.
- Resource allocations should be to a level that is reasonable and acceptable.

Each task within the Rolling Wave is resourced using the agreed upon and established resource pool, regardless of the task owner. Where named individuals have yet to be identified for a specific role, the role is prefaced with TBD. This enables work effort to be quickly identified when the individual joins the team.

4.5 Baseline Standards

All tasks must have a baseline set in the schedules. The initial baseline is set after the CPS is initially approved. When tasks are added to a schedule through progressive elaboration, the CARS PM baselines the schedule at a task level and at a summary task level. This helps the CARS PM to measure variances at later stages. The project baseline information is established so as to assist in tracking planned versus actual variance data.

4.5.1 Baseline Sequence

If required, a new baseline is established and monitored upon CARS SI solicitation release. The CARS Project switches over to an IPS once the CARS SI is on board.

4.5.2 Current Baseline Fields

CARS currently stores information in the following baseline fields. The following highlights what information is stored in each:

1. **Baseline** – (MS Project Baseline – denoted for CARS by the underlined B): Baseline is the active schedule baseline and contains the most recent baselined schedule information. This is the baseline that is used to produce all CARS variance reports.
2. **Baseline 1 – 10**: Represents the estimated dates and effort updated for future use. As additional changes are approved the Baseline number is incremented by one.

4.6 MS Project Field Customization Standards

Custom text fields are used to drive additional information and facilitate schedule update processes and analysis. If additional custom text fields are needed, the field is renamed to alert other MS Project users to its intended purpose to ensure data is not unintentionally overwritten.

Table 2 lists the fields primarily used in the initial development, management, and control of the CPS. This includes the field name, description, when the field is used, and applicable notes related for each column. As the CARS project progresses, these fields are modified depending on changes or modifications not anticipated initially.

Table 2: MS Project Fields and Tables

REF #	FIELD NAME	FIELD DESCRIPTION	FIELD NOTES
1	ID	Number of the task	Auto populated by Microsoft Project
2	Project	Name of the project. Auto populated by the filename	Name of the file under which the schedule is saved should start with the first 3 char = "CPS"
3	Task Name	Name of the task	Special syntax: If LOE tasks: "LOE whatever name"
4	Duration	Number of days assigned to each task	Duration must be defined in days
5	Actual Start Actual Finish	Actual start and finish of a task	Used to note Deviations from the planned Start and Finish dates
6	Task Mode		Must be auto scheduled for tasks (A MSP 2016 feature)
7	Type	Duration Type	Must be Fixed Duration (and not effort driven) for tasks
8	Start	Date task is scheduled to start	Do not type in a date, it forces a constraint; instead, use dependencies and durations and let MSP calculate the date

REF #	FIELD NAME	FIELD DESCRIPTION	FIELD NOTES
9	Finish	Date task is scheduled to finish	Do not type in a date, it forces a constraint; instead, use dependencies and durations and let MSP calculate the date
10	Resource Name	Resources assigned to the task	Individual resources are populated as part of the Rolling Wave approach.
11	Predecessor	Task ID numbers for the predecessor tasks that the task depends upon before it can be started or finished	All tasks accept summary level tasks have Predecessors.
12	Successor	Task ID numbers for the successor tasks to a task	None.

4.7 Task Notations

During the course of a project, it becomes necessary to notate task specific information within the schedule that is of high importance to the entire project team from either a reporting and/or a historical perspective. The Notes field within the CPS is used to document this information.

Table 3: Schedule Notations

Field Name	Designation	Description
Notes	Historical	Where applicable, MS Project "Notes" are added to individual CPS work products or tasks and document specific estimating techniques, business rules, exceptions, and/or points of clarifications. The author notes the date on which the notes were entered along with his/her initials. Information in this field is retained for the lifetime of the schedule. New notes for a task are placed above existing notes in the following format: DDMMYY_AZ – NOTE The AZ depicts the author's initials.

4.8 Project Calendars

The CPS uses the standard calendar and includes all California State Holidays.

5 Construction and Elaboration of Schedules

5.1 Schedule Structure

The CPS contains tasks for different project partners. The schedule contains different sections for scope of work for individual partners. This also allows teams to extract and filter on tasks that reflect only their scope of work.

The tasks and activities required to complete a deliverable are identified and built out based on schedule standards in this plan. The CPS contains all of the information required to manage the project, but not so much detail as to make it difficult to manage. In addition to the status reporting, CARS executes Critical Path analysis, and all activities are networked based on the logical connections between tasks. Consistent and logical relationships enable the team to see downstream impacts if tasks start to slip from the baseline dates.

5.2 Schedule Elaboration

The initial CPS fully defines work through the CARS SI procurement. Future phases are defined at a very high level. These future activities are progressively elaborated once the SI is on board. The project currently plans to switch to an SI PM maintained IPS for future phases. This approach to schedule development, where phases are progressively elaborated upon, is referred to as Rolling Wave planning.

1. As tasks are progressively elaborated by the respective Task Owner, the Task Owner replaces summary level task placeholders and provides task decomposition.
 - a. The Start, Finish, Duration, and Work for these summary tasks remain the same (e.g. the detailed tasks are performed within the timeframe of the summary level task placeholders and add up to the same data as the placeholders.)
2. Any instances where progressive elaboration changes the high level dates or duration of an activity, the updates may be subject to the CARS Change Control process so that impact can be fully determined and risk can be assessed.

6 Schedule Management Change Control

Weekly schedule updates occur in a working copy of the CPS and upon approval the CPS “working copy” becomes the official CARS schedule.

6.1.1 Schedule Approvals

A walkthrough of CPS is conducted by the SOS CARS PM with team members and Executive Management prior to new schedules being submitted to the Project Director for approval.

6.1.2 Incorporating Approved Work into Schedules

Once approved, new, progressively elaborated or re-planned work is incorporated into the CPS on the off-cycle week, leveraging the schedule update process, outlined in section 7.

7 Schedule Update and Tracking

The CPS is updated bi-weekly (see Section 7.2 CPS Updates). This includes modifying the Project Status Date field (within the MS Project Tool) to report the appropriate status.

7.1 Schedule Management Tool

The CARS project uses Microsoft Project as the primary tool to develop and maintain the CPS.

7.2 CPS Updates

The CPS updates focus on schedule and status updates to the CPS for the status-as-of-date occurring on the Friday of the update week. The bi-weekly update cycle focuses on progressing tasks that are in flight.

The CARS Project Manager updates the CPS based on feedback received from the team and the individual component owners. Result is distributed to the team. Each owner is responsible for verifying the accuracy of the schedule.

7.2.1 Collecting CPS Status from Teams

The CARS PM coordinates schedule updates with all team members. At the time of schedule update, feedback is received from individual owners and contractor PMs for consolidating into the CPS.

7.2.2 Reporting Schedule Status

After the CPS is updated, the CARS PM distributes the updates and reports to the team through PDFs.

7.3 Schedule Integrity and Quality

The process of performing updates and entering data into Microsoft Project can and will occasionally adjust data in a manner that is not desirable. CARS PM performs regular schedule audits using Microsoft Project Reports and visual inspection to ensure that the schedule integrity has not been compromised due to the updates.

7.3.1 Schedule Quality Management Audits

CARS PM conducts a comprehensive audit at defined points in the project:

- As soon as the schedule is created and before the first baseline is established
- After establishing the first baseline
- Upon each schedule elaborated as per the Rolling Wave

The audit is performed to determine:

- Does the schedule continue to follow the standards defined in this SMP?
- Does the presented schedule continue to satisfy the project's objectives?
- Does the schedule clearly identify inter-team dependencies?

- Is the scheduling logic as per industry best practices?
- Do the schedule completion estimates, resource allocation, task sequencing, and critical path demonstrate reasonableness (fair and rational)?
- Does the schedule closely follow the original duration and work effort estimates made by the team?
- Are any activities missing a baseline?
- What are the effects of baseline revisions on the CPS?

Should the audit find any of the above, or indicate that best practice project scheduling is not being followed, corrective actions will be taken by the CARS PM.

7.3.2 Schedule Metrics

Schedule health is reviewed at the end of every update cycle. The CARS PM may use the following metrics to perform schedule analysis, if risks and negative trends become apparent:

Table 4: Schedule Metrics

Measure	Description
Percentage Complete	Percent Complete = (Actual Duration / Duration) * 100
Completed On-time Percentage	Number of Tasks (excluding summary tasks) where the Finish Date = Baseline Finish/Total Number of Tasks (excluding summary tasks) *100
Completed Late Percentage	Number of Tasks (excluding summary tasks) where the Actual Finish > Baseline Finish/Total Number of Completed Tasks * 100
Planned to Actual Percentage	Number of Tasks (excluding summary tasks) where the Baseline Finish Date < or = current date/(Number of Tasks (excluding summary tasks) where the Actual Finish Date < or = current * 100
Planning Completeness	Total Number of Tasks (excluding summary tasks)/ Number of Tasks where the Created Date > or = the Start Date of the Summary Task * 100
Cumulative Work Hours Trending	Total Work Hours (Level 1 WBS) NOTE: This number can be tracked month to month and trended.

Measure	Description
Resource Allocation	Number of Actual Resources * Allocation percentage/Work
Growth in Baseline Work	Baseline Work – Total Work NOTE: This number or a calculated percentage can be tracked month to month and trended.
Total Work Variance in Hours for Tasks Completed over Past Month	Work Hour Variance for Tasks where Actual Finish = Current Month NOTE: This number can be tracked month to month and trended.
Number of Late Start Tasks	Number of Tasks where Planned Start = Current time period and Percent Complete < 1%
Percentage of Late Start Tasks	Number of Tasks where Planned Start = current time period and Percent Complete < 1% /Total Number of Tasks = current time period * 100
Number of Late Finish Tasks	Number of Tasks where Planned Finish = Current time period and Percent Complete < 100%
Percentage of Late Finish Tasks	Number of Tasks where Planned Finish = current time period and Percent Complete < 100% /Total Number of Tasks = current time period * 100
Number of Tasks with Missing Predecessors	Number of Tasks without Predecessors
Number of Tasks with Missing Successors	Number of Tasks without Successors
Missing Predecessors or Successors	Number of Tasks without Predecessors or Successors

Should this analysis find any of the above or indicate that best practice project scheduling is not being followed, corrective actions are performed by the CARS PM.

7.4 Maintenance Standards

Multiple work efforts are tracked for CARS. This creates instances where the CPS may become large and difficult to manage. In an effort to minimize the overall size of the schedule files and retain specific data in them, regular maintenance activities are performed. Maintenance activities consist of archiving specific project files for historical reference.

7.4.1 Bi-weekly Archiving of Active Schedules

The CARS PM ensures that a copy of the current MS Project files is stored in the schedule archive folder immediately following the regular update cycle. The copy in the archive folder includes the current archive date extension. The files are located under the following folder path:

[REDACTED](#)

7.4.2 Schedule Update Log

The CARS Project Manager generates a schedule change log to reflect updates made.